



MMA Mobile Marketing Research Digest July, 2009

Each month, MMA Market Intelligence together provides an overview of recent market research on the industry. For further information about MMA's Market Intelligence activities, email research@mmaglobal.com

How US advertisers use Mobile Marketing – MMA 2009 US State of the Industry Survey MMA Market Intelligence

<https://mmaglobal.com/research/state-us-mobile-marketing-industry-2009-view-madison-avenue-and-beyond>

MMA's May 2009 survey of US marketers and advertising agencies found an average of 1.8% of marketing budgets devoted to mobile marketing, a figure which translates to approximately \$1.7 billion of spend this year. This expenditure is growing an average of 26% this year and last, meaning that total expenditure on mobile marketing will exceed \$2 billion in 2010. Providing a top-level overview of mobile marketing activity in the US, this powerpoint summarizes the forthcoming US Mobile Marketing Development Report. (MMA Members-Only Research)

Mobile Apps - Taking a bite of the apple

Juniper Research

<http://www.juniperresearch.com/shop/viewwhitepaper.php?id=179&whitepaper=87>

Juniper Research has predicted that by 2014, nearly 20 billion mobile apps will be downloaded a year. The company's Mobile Applications research report claims that the key to growth will be the rollout of app stores for mass market handsets, rather than just smartphones. It also pinpoints better store interfaces and an increasing range of apps as factors.

Why Mobile's Time Has Come

Forrester

<http://www.forrester.com/Research/Document/Excerpt/0,7211,53701,00.html>

Most strategists realize that mobile is hot, but they're perhaps less sure whether this is hot air or the white heat of progress. The high-profile arrival of Apple and Google in the mobile market has focused both consumer and corporate attention on mobile. This time, due to a unique combination of factors that have not occurred previously, the mobile day has truly dawned. As a result, firms must reassess their mobile strategies now and decide upon when — not if — they should launch new mobile products and services.

Facts and Visions on and by the Market - Mobile Advertising Research UK

Aeneas Strategy

<http://www.slideshare.net/psalz/mob-ad-uk-15-06-2009?type=powerpoint>

Today the mobile advertising market in the U.K. totals nearly GBP 30 million (\$48 million). Mobile advertising accounts for only 0.16 percent of the total advertising market - which is where Internet advertising was in 1998. AENEAS Strategy forecasts that mobile advertising will see accelerated growth in four years and so account for a significant portion of advertising spending. Drivers include: A calculated



growth rate of 99 percent in 2008 vs. 2007; the overall shift towards digital advertising; and increased demand for targeting, reach, and a medium that -like no other - allows advertisers to identify and track unique visitors. Only 32 percent of those surveyed have a positive attitude about receiving advertising on their mobile phone. However, 64 percent said they would accept advertising if they are properly incentivized, and 70 percent said they would accept mobile advertising if they are incentivized AND in control. The majority of those surveyed felt 5 advertising messages per day was the limit of what they would accept.

Location-based services: homing in on viable revenue streams

Analysys Mason

http://www.analysysmason.com/Research/Content/Reports/RDMA0_Location_based_services_July2009/

Location-based services are a hot topic in the telecoms industry, as GPS functionality is incorporated into an increasing proportion of handsets, and the rise of smartphones and OS standardisation continues to catalyse the supply (that is, applications) side of the market. Regulations, such as the US E911 requirements and potential equivalents in Europe, are also having an impact on the market. However, the state of the market with regard to the commercialisation of location-based services – that is, actually generating revenue and margins from them – is embryonic, at best. Advertising, for example, seems to be ideally placed to incorporate a location-based aspect: location information could make mobile advertising a viable option for 'bricks-and-mortar' establishments in cases where previously it may not have been, but there is very little activity in this space, and we believe that it will be 3–5 years before the location-based mobile advertising market takes off.

June 2009 Mobile Metrics Report

AdMob

<http://metrics.admob.com/>

45 million iPhones and iPod touches sold in the last 2 years is quite a feat, even by Apple's standards. In this month's Mobile Metrics report, admob takes a closer look at its iPhone and iPod touch user data to get a sense of where this growth is coming from. For example, 54% of iPhone OS devices are currently in the US. However, this number has slowly declined from 61% in the last six months, implying that international users are growing faster than those in the US.

Global Mobile Broadband Connections to pass 150 million

GSMA

<http://www.gsmworld.com/newsroom/press-releases/2009/3494.htm>

Global HSPA connections will pass the 150 million mark by the end of the summer, the GSM Association has stated. With more than 300 networks across 127 countries and approaching 1500 HSPA enabled devices readily available, HSPA has firmly established itself as the world's dominant mobile broadband technology and the fastest adopted mobile technology of all time.

Mobile Competitions and Discount Vouchers Lead as Promotional Tools

Digital Media

<http://www.digital-media.net.au/article/news-digital-media-releases-mobile-research-data/490784.aspx>



Mobile users are most likely to be drawn to mobile competitions and discount vouchers, with mobile games being less appealing as a promotional tool, according to new research by News Digital Media. The mobile survey, which attracted over 2,000 responses, also found that consumers were becoming more aware of display advertisements that appears on mobile sites. Close to 80% of respondents said they could recall experiencing mobile display advertising.

China Telecoms Intelligence Report

Pyramid Research

<http://www.pyramidresearch.com/store/CIRCHINA.htm>

The Chinese telecom market generated \$110bn in 2008, up 16% from 2007 levels. Going forward, total telecommunications services revenue in China is expected to increase at a CAGR of 8.8% between 2009 and 2014, reaching \$186.6bn. Traditional fixed-line business is expected to decline from \$21bn in 2009 to \$16.7bn in 2014, but the loss will be more than compensated for by growth in the mobile sector. Due to accelerating fixed-to-mobile substitution, China's fixed communications market experienced its first contraction in overall lines in 2008. Lower mobile tariffs, handset prices and close to 100% population network coverage all contribute to the substitution trend.

Asia Mobile Market Forecast, 2008-2014: Emerging Markets Communications Strategies (EMCS)

Strategy Analytics

<http://www.strategyanalytics.com/default.aspx?mod=ReportAbstractViewer&a0=4827>

By 2014, subscriptions in emerging markets will account for 2.8 billion out of the total of 3.1 billion for the Asia Pacific (APAC) region. The developed Asian countries, which have historically dominated mobile communications in the region, will account for less than one tenth of total subscriptions.

2008 Asia - Telecoms, Mobile & Broadband in North and South Korea

BuddeComm

<http://www.companiesandmarkets.com/Summary-Market-Report/2008-asia-telecoms,-mobile-broadband-in-north-and-south-korea-64339.asp>

South Korea has one of the most vibrant and interesting telecommunications markets in the world according to new industry data from BuddeComm. Supported by a visionary government program of stimulating development through liberalisation, deregulation and early privatisation of the incumbent, a creative and energetic private sector and a technology savvy population, the Republic of Korea continues to push forward on this front.

Advertisement trends report 2009 (Latin America)

Reporte de Tendencias Publicitarias 2009

http://latinoamerica.resultics.com/Latinteractivo_2009_Tendencias_Publicitarias_Latinoamerica_2009.pdf

Latinteractivo is the first report compiling opinions and comment from internet experts in Latin America, featuring senior executives from leading businesses and agencies in the Latin American internet space. The report was created to meet the need for greater knowledge of this space within the region, and aims to encourage more businesses to invest in internet marketing. This issue is dedicated to online marketing trends, and new interactive advertising tools available to marketers. It includes a social-economic profile of internet landscape in Argentina and Mexico and a range of topical articles



contributed by top executives from brands including Google, Yahoo!, The Search Agency and Globant. The report also includes collaboration between the Internet Advertising Bureaus (IAB) of Argentina and Mexico.

Argentina Online

Emarketer

(No URL available, PDF Attached)

Argentina, with a population of 40 million and a projected 2008 GDP of \$324 billion, has the third-largest economy in Latin America, behind Mexico and Brazil. It is therefore no surprise that the country also shows clear signs of becoming one of the region's Internet giants. With 40 million mobile phone subscriptions and a penetration rate of 102%, Argentina is clearly a country with an advanced mobile infrastructure. These impressive numbers follow several years of dramatic growth—in 2002 the country was bringing up the rear of the big three in Latin America, with a penetration rate of just 17.5%.

Mexico Online

Emarketer

(No URL available, PDF Attached)

In 2008 27.4 million people in Mexico, nearly one-quarter of the population of 110 million, were online. By 2012, that number is expected to increase by 82% with the number of broadband subscriptions expected to reach 9.9 million; an 89% increase from the 2008 figure. As recently as 2005 penetration was only 45.1%, rising by more than 23% by 2008, demonstrating how remarkable mobile phone penetration growth in Mexico has been over the past several years. By 2010 it is expected to reach 91.5%.

Mobile Marketing in Latin America (El mobile marketing en América Latina)

Movilion

<http://www.movilsur.com/index.php/2009/03/24/el-mobile-marketing-en-america-latina/>

This survey gathers information from 134 readers of the blog from six different countries in Latin America. In a market where consultants are often making predictions of future market development, the Movilion report focuses on the things that companies are doing effectively in the early stages of mobile marketing, even though this is still very much a growing space.

Mobile Communications and financial development in Latin America (Telefonía móvil y desarrollo financiero en América Latina)

Ariel, BID and Fundación Telefónica

<http://movilybanca.files.wordpress.com/2009/04/telefonía-movil-y-desarrollo-financiero-en-america-latina-20090331.pdf>

The Interamerican Development Bank and the Telefonica Foundation share an interest in identifying innovative initiatives that combine technology and new Business models, to allow and encourage the economic and social development of Latin America and the Caribbean. In order to address this objective they have developed a report summarising the opportunities and challenges faced by the region and the ways that mobile technologies will serve in addressing them.